

II. Development of the 2003-2007 Montana Historic Preservation Plan

The current planning process can be said to have begun when the previous effort concluded with the adoption and release of *Working Together: The Montana Historic Preservation Plan* in 1997. Direct focused solicitation of public participation in the preparation of the current document nonetheless began in earnest in Spring of 2001 and continued through Fall of 2002. Development occurred and was facilitated over time through a feedback process that includes comments on the pre-existing Plan, annual review of its implementation, solicitation of input through questionnaires, revision, and open discussion. It continues into the next cycle with a return to comments and feedback on the current revised plan.

Plan feedback. The process of developing the current Montana State Plan began with the completion and approval of the previous State Plan in 1997. Although the special "preservation plan task group" envisioned in the 1997 Plan to review and organize comments on a periodic basis failed to materialize as a formal entity, feedback on the Plan – both negative and positive – was nonetheless welcomed by SHPO staff and regularly discussed. Each copy of the distributed 1997 Plan was accompanied by an invitation to provide SHPO with comment. Some of these comments made their way into the 1997 Plan itself (*Working Together, Appendix B*). These comments, provided sporadically over a number of years, were important in formulating a strategy for replacing or revising the Plan in 2002.

Annual application. Annually between 1997 and 2002, SHPO staff also reviewed the goals and objectives of the 1997 State Plan as part of its application for federal funding through the Historic Preservation Fund. As required by National Park Service guidelines, annual workplans of activities developed for the various SHPO programs must establish their foundation in the goals and objectives identified in the State Plan. Beginning in 2000, a report (written outside of the framework of the required National Park Service year-end report) of the SHPO's success in accomplishing these proposed activities was made available to interested parties for comment. These included the Governor-appointed 9-member Montana Historic Preservation Review Board, charged with providing SHPO advice and guidance in historic preservation planning. Among SHPO staff, this annual review of goals and objectives established in the 1997 Plan proved to be an excellent opportunity for evaluation, leading to the realization and decision to modify these goals in the present Plan to make them more applicable and responsive to issues and programs.

Questionnaires. In March of 2001, SHPO circulated a preservation planning questionnaire to approximately 220 individuals listed in the *Montana Historic Preservation Services Directory*. These individuals, broadly classifiable as historic preservation professionals or primary contacts for assistance in historic preservation projects within the state, were provided the questionnaire in conjunction with a revised 2001 edition of the *Directory* and a stamped self-addressed reply envelope. The 27%

reply to Questionnaire #1 is considered an excellent baseline for evaluation, the results and discussion of which are provided here in Appendix A.

A second preservation planning questionnaire, Questionnaire #2 (Appendix B), was also developed to gain input from a broader audience, specifically individuals less familiar with SHPO and its programs. This questionnaire premiered at the annual meeting of the Montana Archaeological Society in April of 2001. It subsequently was distributed with the annual 2001 Montana Historic Preservation Poster to over 780 addresses in May of 2001, was enclosed with SHPO correspondence throughout the summer, and concluded as an insert in the registration packets of those attending the Montana Historical Society's annual History Conference in October of 2001. Despite a lower response rate, Questionnaire #2 succeeded in gaining written input from a different audience than that of Questionnaire #1 and also assists in evaluating its conclusions.

Both Questionnaires #1 and #2 were designed to take advantage of and build directly from the preservation planning efforts undertaken five years ago. Individuals were presented with some of the same questions asked in 1995/1996 in order to gauge how much has changed with regards to issues, needs and assessments of resource condition. Respondents were also asked specifically to rate the priority or importance of the nine Goals identified and adopted in *Working Together*, the 1997-2002 Plan. This comparative approach was especially informative and helpful for developing the current Plan.

Goal Revisions. With consideration of the feedback and experience gained through implementation of the 1997 Plan combined with input from the 2001 questionnaires, SHPO staff concluded in its FY2001 Year-End Report to the National Park Service that the Montana Historic Preservation Plan merited updating and revision, rather than a major reformulation. Specifically, SHPO staff recognized continuing concern with many of the same preservation issues identified five years ago yet overall satisfaction with the state preservation program, suggesting the need to adjust, rather than reinvent, Montana's preservation goals and objectives to make them more current and perhaps more effective.

Consequently SHPO staff formulated a revised set of goals and objectives for use in 2003-2007. Other state's Plans were consulted to assist in this effort. The result, a set of five concise goals each with measurable objectives, was introduced to the public through the mailing of the 2002 Montana Historic Preservation Poster in May and subsequently at conferences and in SHPO correspondence during the year. Comments were welcomed in the form of telephone calls, email, or written correspondence. They were largely received verbally. These comments indicated general support for both the scope and nature of the revised goals and objectives, and in particular appreciation for their increased clarity. Some further refinements were made in the proposed goals and objectives as a result of these comments.

Discussions. Open two-way communication with the public and interested parties was stressed throughout the current planning process by making reference to the developing Plan in conversations, meetings and other forums. Special efforts in this regard were

made to engage the 15 local preservation officers of the Montana Certified Local Government (CLG) program and with the tribes. Montana's community preservation officers are recognized as experts in local public opinion regarding historic preservation matters, and especially those issues existing outside the narrow confines of federal and state preservation law. Thus, conversations between CLG representatives and SHPO form the basis of many significant insights into public needs and concerns. Likewise, recognizing that tribal response to questionnaires and written correspondence have traditionally been limited, SHPO strived in this effort to solicit input verbally and in a culturally meaningful manner whenever possible. A greater awareness of tribal perspectives was thereby achieved, reflecting in the goals of this revised plan

SHPO also met individually in discussions with the State Preservation Review Board, the Board of the non-profit statewide Montana Preservation Alliance (MPA), and with the Montana Archaeological Society (MAS), Committee for Conservation Archaeology. All three groups provided support for the revised goals and objectives, including formal endorsement by the MAS.

Revised Plan Review. With acceptance of *Working Together to PRESERVE MONTANA, 2003-2007* by the National Park Service, the planning process does not end, but rather returns to the beginning to repeat itself in comments received on this product. In this planning cycle and in keeping with the revised goals, SHPO intends to post the Plan on its website under www.montanahistoricalsociety.org and, pending funds, to produce a pamphlet that will draw attention to the Plan for a much broader distribution than in the past. The 4-6 page brochure - illustrated with photographs, charts and graphs - will draw from the conclusions of the Plan while also outlining its adopted goals and objectives and how these are reflected in SHPO and other programs. This format should find a larger audience and engender greater awareness and use as well as response to Montana's State Plan for historic preservation. It promises to yield significantly more input useful for implementing the Plan as well as for the development of its successor.